



Letter of Intent for a Future Estate Gift

As evidence of my/our desire to provide a legacy of support to the ministry of St. Philip the Deacon Lutheran Church, I/we hereby inform St. Philip the Deacon that I/we have made a provision for a gift to the St. Philip the Deacon Foundation *or* St. Philip the Deacon Lutheran Church in my/our estate plan. I/we understand that this commitment is revocable and can be modified by me/us at any time.

Name: _____ Date of birth: _____

Name (if joint gift): _____ Date of birth: _____

Address: _____

City: _____ State, Zip: _____

Email: _____ Phone: _____

Lawyer: _____ Phone: _____

Financial Planner: _____ Phone: _____

It is my/our intent to leave a legacy gift to the **SPD Foundation /** **Church through my/our:**

- Will Retirement Plan Assets Life Insurance Policy
- Living Trust Charitable Remainder Trust Other: _____

Note: A legacy gift to the Foundation is a gift in perpetuity (only interest will be spent); a legacy gift to the church will be added to regular annual gifts during the year of receipt. Both types of gift are important.

Please select one of the following options:

- I/we intend this gift to be used to expand and augment the ministry and mission of St. Philip the Deacon wherever the need is greatest. *This is the Foundation and Church's preferred option.*
- If possible, I/we would like this gift to be used for the following ministry: _____
I understand that this designation will require discussion with, and approval by, the Foundation Board and Church Leadership.

Please enroll me/us in St. Philip the Deacon's Rejoicing Partners.

- Feel free to publish my/our name(s) among the list of Rejoicing Partners members as a motivation for others to leave a legacy gift to benefit the future ministry and mission of St. Philip the Deacon.

I/we wish my/our names(s) to appear as: _____

- We prefer that you do not publish my/our names on any donor roster (this is an anonymous gift).

Donor Signature Date

Donor Signature Date